CBS cable

- CBS bracing Wall Street for wet, red ink
- Mile Hi wins Denver franchise — easily
- Satellite News Channels sets the date
- Showtime unleashes national campaign

CableVision™

The news and features weekly of the cable television industry

March 8, 1982

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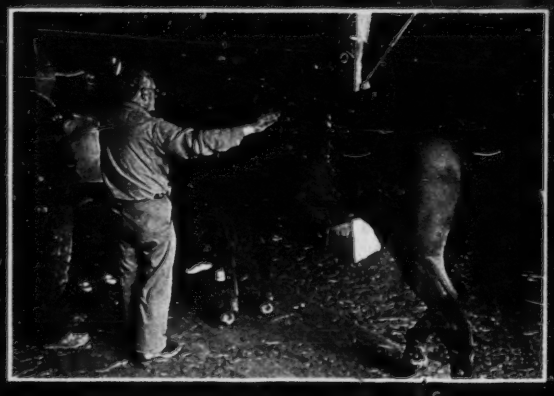

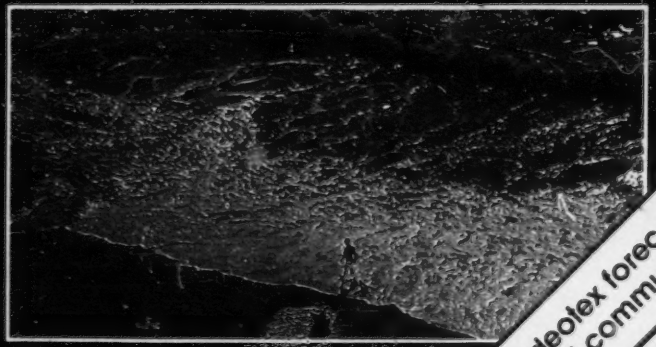

Videotex forecasts future of communications

BEST AVAILABLE COPY

CableVision Volume 7, Number 25, March 1, 1982

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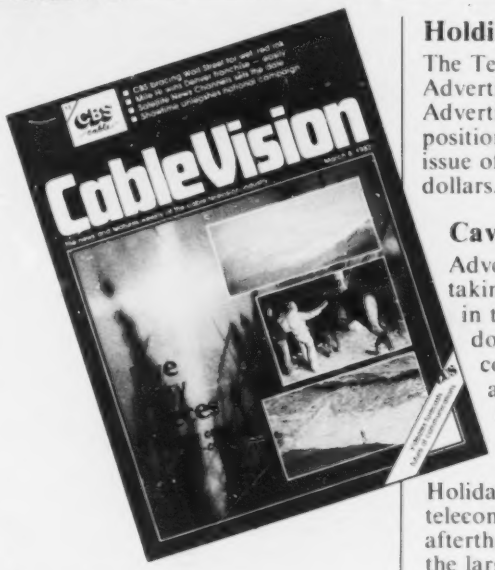


Cover story

This week's cover story focuses on construction operations in five different communities—each with a different geography and a different management. But all have a common goal—to build a high quality system on time and in tune with the communities' needs. Cover photos by Rob Stuehrk. **Page 93.**

Creativity binge

While some firms are waiting for the cable programming explosion to reach them, the Corporation for Entertainment and Learning claims to be doing very well right now. **Page 25.**

Going national

USA Network and Post-Newsweek Productions have reached an historic agreement. The end result of that cooperative venture is to put *Sonya* in the cable limelight. **Page 25.**

Keeping active lines

Home Box Office officials boast the lowest churn rate in the industry. However, the company is not satisfied with its current figures and is moving fast to keep even more subscribers. **Page 37.**

Trying harder

Having a good spot in the line doesn't amount to a hill of beans, especially in the fiercely competitive multipay market. Home Box Office is working to correct that problem in Ann Arbor, Mich. **Page 39.**

Holding their ground

The Television Bureau of Advertising and the Cabletelevision Advertising Bureau are holding their positions on the increasingly heated issue of where to spend ad dollars. **Page 43.**

Caveat: Go steady

Advertising agency directors are taking the position of slow and sure in the mounting fight for the ad dollar. Opinions were in stark contrast to those offered a week ago and are adding fuel to the fire. **Page 43.**

Taking a mile

Holiday Inns got into teleconferencing more as an afterthought than by design. Now the large hotel chain is actively seeking new means and technology to enhance its potential gold mine. **Page 49.**

Around the bush

AT&T continues to attract a great deal of attention from a wide range of interested audiences. Rep. Timothy Wirth is conducting House hearings on his bill addressing some of those issues—it's proving exasperating. **Page 115.**

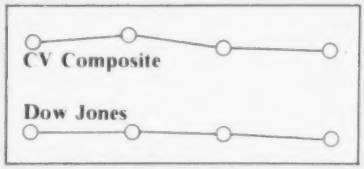
Highest ranking

Valley Cable TV has scored at the top of the list in a California franchise battle. Canadian investors are part of that consortium and may end up fighting an even bigger war over proposed legislation. **Page 121.**

This week in *CableVision Plus*

Dow Jones embraces a new communications era with its interactive information services, changing the face of an informed reader's "must" list. Editor Jeri Baker examines the company's multi-faceted system. Analyzing systems in Portland, Ore., Omaha, and Cincinnati, a six-month study finds that videotex may spell financial risk for MSOs. High development cost and low initial penetration are the culprits. Completing the operations theme, a third article measures the advance of the quiet billing revolution. Operators are slowly making the transition from primitive to sophisticated computer methods. **Pages 69-92.**

Advances	17	1,700
Declines	41	
Unchanged	12	1,400
CV Manufacturers	613.88	
CV Operators	579.25	1,100
CV Services	305.56	800



THE MARKET

Company	Stock Exch.	Closing Feb. 22	Closing Feb. 15	Net Change in Period	% Change in Period	1981 High	1981 Low	P/E Ratio
Operating Companies								
Acton	ASE	8	7¾	- ⅛	3.23	21⅞	9	12
Adams Russell	ASE	20⅝	20½	- ⅛	0.60	29⅛	17⅝	16
AEL (Am Elec Lab)*	OTC	10	10¼	- ¼	2.44	20¼	11¼	d
Central Telephone	NYS	29⅛	29¾	- ¼	0.85	35⅜	23⅛	8
Comcast A	OTC	19	19¾	- ⅜	3.80	27½	17⅜	19
Cox Broadcasting	NYS	34⅛	34⅛			39⅛	27⅛	17
General Electric	NYS	60¼	60	+ ¾	1.25	69⅞	51⅛	9
Harte-Hanks	NYS	25¼	26¾	-1⅜	4.19	40¼	28½	12
Heritage Comm.	OTC	8⅝	9½	- ⅞	9.21	16⅜	9¼	36
Jones Intercable A	OTC	5	5¼	- ¼	4.76	8⅝	4¼	33
Multimedia, Inc.	OTC	34	34			37¼	27	13
New York Times	ASE	34½	34¼	+ ⅜	1.10	38½	26½	9
Rogers Cablesystems B	OTC	6¾	6¾			15⅝	6	
Rollins, Inc.	NYS	15⅞	16½	- ⅛	1.55	22½	14	9
Storer Brdcstg.	NYS	25¼	24⅝	+ ¼	3.08	43	23¾	16
TCI (Tele-Comm.) A	OTC	21¼	21½			31½	16⅝	51
Times Mirror	NYS	43¼	43⅞	- ⅛	0.28	58½	39¼	11
United Cable TV	NYS	25¼	24¼	+ ⅜	1.51	36	18½	24
Viacom	NYS	20	21	-1	4.76	33¾	22	15
Warner Comm.**	NYS	55¾	58¾	-2¼	4.69	58¾	33¾	18
Westinghouse**	NYS	22½	24	-1½	6.25	34½	23	5
Wometco Cable TV	OTC	9	8¾	+ ¼	2.86	16¼	8¼	28
Wometco Enterprises	NYS	21¼	19½	+1¾	8.97	25¼	14¾	10
Wrather	ASE	23	23			29¾	18⅝	d
Service and Finance Companies								
Allied Artists	OTC	⅛	⅛			⅛	⅛	
AM Cable TV*	OTC	6¼	6⅜	- ⅛	1.96	24¼	6¼	d
Am. Edu. TV Network	OTC	3/16	3/16			4	3/16	
Avco	NYS	15¼	15⅜	- ⅛	0.81	32¼	16	5
Burnup & Sims	OTC	12⅛	11¾	+ ⅜	3.19	17⅞	11½	12
Capital Cities Comm.**	NYS	71¾	72	- ¼	0.35	80½	56½	12
Disney (Walt) Prod.	NYS	49⅝	49	+ ⅝	1.28	67⅛	43⅝	14
Gulf & Western	NYS	16	16¼	- ⅛	0.78	22⅛	14	5
MCA	NYS	45	46⅝	-1⅝	3.49	59	38⅝	11
MGM Filmco	NYS	6¼	6¼	+ ⅛	2.04	12⅞	5¼	10
TeleMine Co.	OTC	1⅛	1⅜	- ¼	18.18	13	1⅛	
Time Inc.**	NYS	34¼	33	+1¼	3.79	41⅜	26⅝	15
Transamerica	NYS	21	21¼	- ⅛	1.18	26¼	17½	7
Turner Broadcasting	OTC	9	9¼	- ¼	2.70	20	6½	d
Tymshare, Inc.	NYS	17¾	19¼	-1⅝	8.44	57¾	23¼	11
Manufacturers and Distributors								
Anixter	NYS	15¼	15⅝	- ½	3.20	20⅞	12¼	10
Arvin	NYS	12¾	12½	+ ¼	2.00	18	11¾	7
Augat	NYS	23½	22⅜	+ ⅛	0.56	34⅞	23¼	16
Cable TV Industries	OTC	9	9½	- ½	5.26	18¾	9¼	12
C-COR Electronics	OTC	18¼	18⅝	- ⅜	2.01	21¼	10½	25
Compact Video	OTC	4¾	4⅜	+ ⅜	8.57	24⅜	6¾	8
Comtech	OTC	4⅜	4	+ ⅜	9.38	7¼	2¼	17
Contl. Tel.	NYS	15¼	15⅝	- ⅜	2.40	19½	14¼	7
Datavision	OTC	5¾	5½	- ¼	2.27	7½	2½	d
Eastman Kodak	NYS	66⅞	69⅜	-2½	3.60	85⅜	60⅝	9
Gen. Instrument	NYS	36⅞	37	- ⅛	0.34	46¼	24¾	14
GTE	NYS	28¼	29¼	-1	3.42	34¼	24½	7
Harris Corp.	NYS	33	34⅛	-1⅛	3.30	60¼	37½	12
Insilco	NYS	16¼	16½	- ¼	1.52	22½	14¼	7
IVC (Intl. Video)	OTC	⅛	⅛			⅛	⅛	
M/A-COM, Inc.	NYS	20½	22¾	-2¼	10.06	35½	20¼	24
Microdyne	OTC	13¼	13¼			33¾	13	16
3M	NYS	54½	55	- ½	0.91	65	48	10
No. Amer. Phillips	NYS	33⅝	34	- ⅜	1.10	59⅜	35⅛	6
Oak Industries**	NYS	29⅛	28⅛	+ ⅛	2.64	38½	21⅛	14
RCA	NYS	17⅛	20⅛	-2⅞	12.88	32¼	16⅛	9
RMS	ASE	7⅛	8	- ⅛	3.13	20	7½	12
S.A.L. Cable Comm.	OTC	5½	6½			15⅝	6	8
Scientific-Atlanta	NYS	23⅛	24	- ⅛	1.04	34⅛	18⅛	25
Sony	NYS	14¼	14⅛	+ ⅛	0.85	26¼	14½	14
Tektronix	NYS	48¼	48¼			63¼	45¼	12
Telemation	OTC	2¼	2¼			3⅜	1¾	
Texscan	ASE	14¼	15½	-1⅜	8.87	22½	9¾	23
Times Fiber Comm.	OTC	19	20	-1	5.00	28¾	16¼	25
TOCOM	OTC	9	9¾	- ⅝	7.69	15¼	8¼	d
Wavetek	OTC	10	9¾	+ ⅛	2.56	21½	10	16

* Also indicates involvement in manufacturing.
** Also indicates involvement in entertainment and/or system operation.
d indicates deficit.

buted the increase to proliferating cable markets and subsequent demand for network promotion and standard conversions of foreign programming.

Alpha opens new building

Alpha Technologies has moved into its new 15,000 square foot facility. According to F. Kaiser, president, the move was necessary to accommodate the firm's rapid growth sparked particularly by the CATV market.

Nielsen high on future

A.C. Nielsen Jr., chairman and chief executive officer, has told stockholders he expects 1982 sales and profits to exceed record levels attained in 1981. Nielsen cited services, technology, organizational quality and a rational dividend process for his projections.

MCI exercises option

RCA American Communications Inc. has announced that MCI Telecommunications Corp. has exercised an option to lease a minimum of 2,000 voice-grade channels on the Satcom satellite system. The option is part of a three-year service agreement.

Polaproof labels chosen

MGM/CBS Home Video has selected to use Polaproof as a deterrent to counterfeiting of trademark goods. The optically unique authentication material will be used on all of its cassettes for the "First Run" Home Video Theater rental program.

CableBus investment made

Telephone Utilities, which is 80 percent owned by a holding company of Pacific Power and Light, has invested $1.5 million in CableBus Systems Corporation. The agreement gives Telephone Utilities a debt instrument that is convertible into CableBus common stock.

Cable penetration in top 25 TV markets

Rank	Market	Cable Subscribers*
1	New York City	1,349,907
2	Los Angeles	624,728
3	Chicago	175,751
4	Philadelphia	693,157
5	San Francisco	663,484
6	Boston	288,091
7	Detroit	175,275
8	Washington, D.C.	79,425
9	Cleveland	265,391
10	Dallas-Fort Worth	116,496
11	Pittsburgh	552,676
12	Houston	192,176
13	Minneapolis-St. Paul	44,945
14	St. Louis	94,034
15	Seattle-Tacoma	236,616
16	Atlanta	208,150
17	Miami	288,325
18	Tampa-St. Petersburg	169,035
19	Baltimore	69,682
20	Denver	53,637
21	Indianapolis	165,050
22	Sacramento-Stockton	402,349
23	San Diego	361,940
24	Portland, OR	85,239
25	Kansas City, MO	112,912

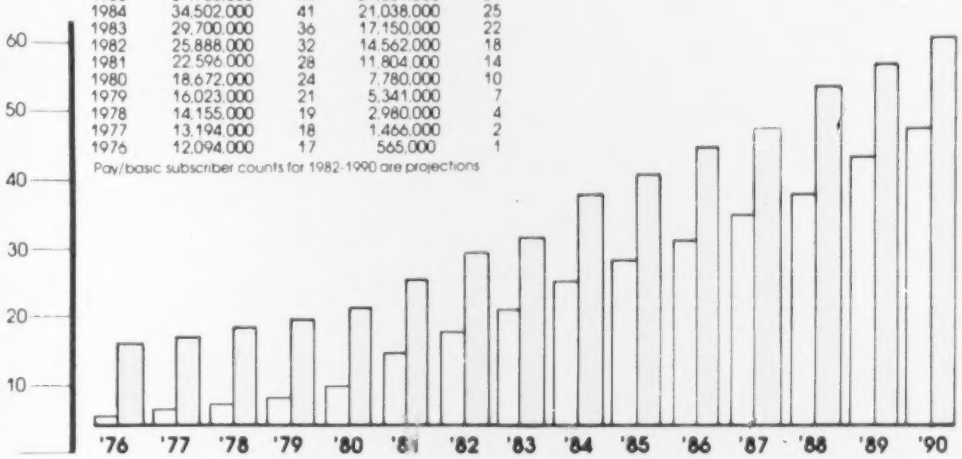
*Cable penetration in 50 mile radius of market city, subscriber totals from "Cablefile/82"

Cable stats

Pay/basic cable growth

Year	Basic Subscribers	% of TVHHs	Pay Subscribers	% of TVHHs
1990	57,812,000	61	43,596,000	46
1989	53,882,000	58	39,018,000	42
1988	49,194,000	54	34,618,000	38
1987	45,543,000	51	31,255,000	35
1986	41,148,000	47	27,016,000	32
1985	37,763,000	44	24,889,000	29
1984	34,502,000	41	21,038,000	25
1983	29,700,000	36	17,150,000	22
1982	25,888,000	32	14,562,000	18
1981	22,596,000	28	11,804,000	14
1980	18,672,000	24	7,780,000	10
1979	16,023,000	21	5,341,000	7
1978	14,155,000	19	2,980,000	4
1977	13,194,000	18	1,466,000	2
1976	12,094,000	17	565,000	1

Pay/basic subscriber counts for 1982-1990 are projections



Cable barometer

Television households (TVHH) ... 80,700,000
Homes passed by cable (HP) 42,000,976
Percent of TVHH passed by cable 52.05%
Basic cable subscribers 22,821,167
Percent of TVHH with basic cable . 28.28%
Percent of HP with basic cable . 54.34%
Pay cable subscribers 12,051,461
Percent of TVHH with pay cable .. 14.93%
Percent of HP with pay cable .. 28.69%
Percent of basic subs with pay cable 52.81%

Satellite line up

Satcom IIIR (RCA Americom)

	Transponder
Warner Amex (Nickelodeon/ARTS)	1
PTL Television Network	2
United Video (WGN, WFMT, Lifestyle, Dow Jones, JISAL)	3
Times Mirror for Spotlight	4
Warner Amex (The Movie Channel)	5
Southern Satellite Systems (WTBS, The Women's Channel, Cabletext, North American Newstime)	6
ESPN	7
Christian Broadcasting Network	8
USA Network, C-SPAN, BET	9
Showtime (west)	10
Warner Amex (MTV, Music Television)	11
Showtime (east)	12
HBO (west)	13
Cable News Network	14
Warner Amex owned (for CNN2)	15
Showtime, ACSN, National Jewish Television, AETN	16
Showtime, (used by Eastern Microwave for WOR)	17
Reuters, GalaVision (at night)	18
C-SPAN	19
HBO (Cinemax-east)	20
Landmark (Home Theater Network early evening)	21
HBO/Modern Satellite Network, leased for Daytime March 1982	22
HBO (Cinemax-west)	23
HBO (east)	24

Satcom IV—Launched January 15, 1982, 24 transponders, 4/6 Ghz, slated to be operational April 1982
Satcom V—Projected launch mid-1982
Satcom IR—Projected launch September 1983
Satcom IIR—Projected launch September 1983

Westar III (Western Union)

	Transponder
Audio	1
Hughes Television Network, Blairsat	2
Intelsat (Mexico)	3
Audio	4
Occasional use	5
CBS Cable	6
Robert Wold Company	7
SIN	8
SSS (SPN)	9
ABC TV	10
CNN	11
Eternal Word Television Network/occasional video services	12

Westar IV—Projected launch February 25, 1982
Westar V—Projected launch September 1982

Comstar D-2 (AT&T/GTE)

	Transponder
ESPN (Rainbow Programming/Bravo-evenings)	3H
National Christian Network (subleased to Rainbow/Escapade)	4V
SIN	4H
Warner Amex	6V
HBO (Cinemax-east, temporary)	7V
Showtime (subleased to Compact Video)	8V
Trinity Broadcasting	9V
HBO	9H
American Medical Buildings	10V

Galaxy I (Hughes Communications)—Projected launch May 1983, 24 transponders, 4/6 GHz Transponders reserved: Time Inc. (6), Westinghouse (4), Turner Broadcasting (2), Times Mirror (2) Viacom (2)
Galaxy II—Projected launch September 1983, 24 transponders, 4/6 GHz
Galaxy III—Launch date pending demonstration of market demand, 24 transponders, 4/6 GHz

Spacenet I (Southern Pacific Communications)—Projected launch February 1984, 18 transponders-4/6 GHz, 6 transponders-12/14 GHz Transponders reserved: SSS (3) Pop Network (3) SIN (2), Landmark Communications (2), Bonneville International (3), Southern Baptist Convention (2), United Video (1), Midwest Radio & TV (1), Double-B Enterprises (1), Rainbow Communications (1)
Spacenet II—Projected launch October 1984, 18 transponders-4/6 GHz, 6 transponders-12/14 GHz
Spacenet III—presently being built

Franchising calendar

This chart examines the franchise status of communities during the last quarter of 1981 and the beginning of 1982. "Pending" refers to communities which are in the franchising process but have yet to make an award.

Arizona
Glendale—award to Camelback Cable (Storer) 12/81, 35,000 homes
Scottsdale—award to United Cable Television 11/81, 44,000 homes
Tucson—award to Cox Cable Communications 10/81, 135,000 homes

California
Alameda—pending
Bellflower—pending
Boyle Heights—award to Buena Vista Telecommunications 1/82, 23,000 homes
Compton—award to CATV West 11/81, 22,000 homes
East San Fernando Valley—formal presentations on 2/25
East Yolo—pending
Garden Grove—award to Rogers Cablesystems 2/82, 40,000 homes
Gardena—award to Teleprompter 2/82
Grand Terrace—pending
Hacienda Heights—pending
Hawaiian Gardens—award to CATV West 1/82
Hawthorne-pending
Lakewood—applications due 4/30/82
Lomita—proposals due 2/15/82
Los Alamitos—proposals due 1/12/82
Sacramento—applications due 3/15/82, final selection expected this fall
San Fernando—pending
San Mateo County (Ladera Heights, Baldwin Hills, Lennox)—award to Jack Barry Cable TV 9/81, 12,000 homes
Santa Ana—award to Teleprompter 12/81, 65,600 homes
Santa Fe Springs—award to Cablesystems Pacific 10/81
Seal Beach—award to Teleprompter 10/81, 13,900 homes
South Los Angeles—pending
South Whittier—pending
Torrance—award to Teleprompter 2/82, 52,000 homes

Colorado
Cherry Hills—award to United Cable 2/82, 1,600 homes
Denver—Mile Hi Cablevision chosen for negotiation 2/22/82
Edgewater—pending
Greenwood Village—pending
Longmont—second vote on award 5/4/82
Northglenn—pending
Thornton—award to American Television and Communications 1/82, 15,000 homes
Wheatridge—pending

Florida
Miami—award to Americable/Tele Communications Inc. 10/81
Plant City—award to Plant City Cablevision 12/81
Plantation—award to Planned Cable Systems 1/82
Tampa—RFP expected late spring/early summer
Walden Lake—pending

Georgia
Lithonia—award to Cable DeKalb (Cable America) 12/81, 900 homes

Illinois
Brookfield—pending
Chicago—cable ordinance adopted, RFP expected in May
Flossmoor—award to Centel Cable 2/82, 2,800 homes
Lake County—south central unincorporated areas award to Centel Communications, northern portion award to U.S. Cable of Waukegan 12/81
Lincolnwood—pending
Schiller Park—award to Continental Cablevision of Cook County 11/81
Skokie—award to Teleprompter Corp. 12/81, 21,000 homes
Thornton—award to Centel Communications 11/81
Woodridge Village—award to Cablevision of Chicago 12/81, 8,600 homes

Indiana
Boone County (unincorporated areas)—pending
New Palestine—award to Quality Cable TV of Sheridan 11/81
Spring Lake—Quality CATV contract tentatively approved 1/82
Thorntown—pending
Westfield—award to Mobleville Cablevision 1/82
Zionsville—pending

Iowa
Denver—award to Heritage Communications 1/82
Waverly—award to Heritage Communications 1/82

Kentucky
Oldham—award to Oldham County Cablevision 10/81, 10,000 homes
Pioneer Village—award to Bullitt County Communications (Matrix) 1/82, 280 homes

Maryland
Baltimore—RFP expected early spring
Montgomery County—eight bids received 2/3/82
Prince George's County—northern portion (120,000 homes) award to Storer Cable Communications, southern portion (100,000 homes) award to MetroVision 12/81

Massachusetts
Bellingham, Mendon—award to Southern Massachusetts Cablevision (Alda Group) 1/82, 5,500 homes
Bridgewater—applications for license due 2/16/82
Brockton—award to Continental Cablevision 10/81
Brookline—award to Times Mirror 9/81
Foxboro—award to Cablevision Systems 1/82
Hull—applications for license due 4/5/82
Milton—award to American Cablesystems 2/82, 8,500 homes
North Reading—award to Rollins Cablevision 11/81
Norton—award to Rollins Cablevision 1/82, 3,600 homes
Norwell—applications due 1/29/82
Salisbury—award to New England Cablevision 1/82
Westford—award to Nashoba Cable Communications Inc. 1/82
Westwood—award to Adams Russell 1/82
Whitman—applications for license due 3/1/82

Michigan
Detroit—pending
Farmington Hills—award to MetroVision 2/82, 36,000 homes
Inkster—award to Barden Cablevision 10/81
Oak Park—pending
Oakland County (Birmingham, Beverly Hills, Bingham Farms, Franklin)—award to Booth Communications 1/82, 15,000 homes
Royal Oak—award to Barden Cablevision 10/81
Southfield—award to Continental Cablevision 10/81, 33,000 homes
Sterling Heights—award to Comcast Cablevision 2/82, 35,000 homes

Minnesota
Arden Hills—pending
Columbia Heights, Hilltop—award to Teleprompter 12/81, 7,700 homes
Falcon Heights—pending
Lauderdale—pending
Little Canada—pending
Kasson—proposals due 1/11/82
Mounds View—pending
New Brighton—pending
North Oaks—pending
Owatonna—pending
Roseville—pending
St. Anthony—pending
Shoreview—pending

Missouri
Claycomb—pending
Glendale—pending
Maplewood—award to Continental Cablevision 1/82
Pleasant Valley—pending
Riverside—pending
St. Louis—pending

Nevada
Clark County—award to Community Cable TV (Times Mirror) 9/81

New Jersey
Woodstown—award to Penn Communications 10/81

New York
Aurora, Aurelius, Cayuga, Cayuga County, Ledyard, Springport, Union Springs—proposals due 1/82
Harrison—pending
Lawrence—award to Adams Russell 9/81, 2,000 homes
New York City—completion of preliminary negotiations expected 2/82, final award expected in spring
Westfield—proposals due 12/81

North Carolina
Davie County—proposals due 3/1/82

Ohio
Avon—award to Continental Cablevision of Northeast Ohio 10/81
Avon Lake—award to Continental Cablevision of Northeast Ohio 11/81
Berea—award to Complexicable 9/81
Brooklyn—municipal ownership decision pending
Brunswick—award to Brunswick Cable Communications 10/81
Cleveland—pending
Garfield Heights—Cox award overturned 10/81
Highland Heights—award to Viacom Cablevision 12/81
Jackson Township—award to Warner Amex Cable Communications 1/82, 10,000 homes
Maple Heights—award to Viacom Cablevision 1/82
Middleburg Heights—six bids received. Award expected late February, early March
Riveredge Township—award to Riveredge Cablevision Co. 12/81
Wadsworth—award to Warner Amex Cable Communications 2/82, 6,000 homes
Whitehouse—pending

Oregon
East Multnomah County—pending
Gresham—negotiating for franchise
Lake Oswego—award to Storer/Metro 12/81
McMinnville—proposals due 3/1/82
Milwaukie—Liberty Cable's proposal rejected 1/82
Newburg, Dundee—award to Liberty Communications 10/81
St. Helen's—award to Harmon Telecommunications 2/82, 3,000 homes

Pennsylvania
Philadelphia—three franchises pending

Rhode Island
Middletown, Portsmouth, Tiverton, Little Compton—pending

Tennessee
Ashland City—award to Cablevision Enterprises of Tennessee 11/81
Cheatham—award to Cablevision Enterprises 1/82
Germantown—award to Germantown Cablevision Associates 12/81

Texas
Plano—award to Collin County Communications (Storer) 12/81, 20,000 homes

Utah
Fruit Heights—business license granted to Wasatch Cable 11/81

Virginia
Dinwiddie County—applications due 4/30/82
Fairfax County—two proposals submitted 2/15/82
Staunton—pending
Suffolk—award to Cross Country Cable 9/81, 11,600 homes

Washington
Seattle—RFP expected February

Wisconsin
Brookfield—award decision tabled until 3/2/82
Kenosha—pending
Mequon—award to RVS Cablevision of Wauwatosa 12/81
Milwaukee—six firms gave presentations of proposals, award expected early summer
Mukwonago—award to RVS Cablevision 1/82
Muskego—award to RVS Cablevision 11/81